



# Roadshow Agenda

## Coming to a City Near You!

*\*Subject to change*



| 8:30 am—9:00 am          | Registration & Coffee   |
|--------------------------|---|
| 9:00 am—9:15 am          | Welcome & Overview  |
| 9:15 am—10:15 am         | Get to Know Advanced Search & Advanced Queries (AQs) <ul style="list-style-type: none"> <li>• Setting up your fields with searchable values</li> <li>• When to use and not use the Grouping Option</li> <li>• Using the results grid</li> </ul> |
| 10:15 am—10:30 am        | Break & Work Check-In   |
| 10:30 am—12:00 pm        | Reports <ul style="list-style-type: none"> <li>• Understanding the Standard Reports &amp; how to use what you already have!</li> <li>• Improving your configuration &amp; setup for better reporting</li> </ul>                                 |
| <b>12:00 pm—12:30 pm</b> | <b>Q&amp;A/Lunch (will be provided)</b>   |
| 12:30 pm—1:45 pm         | Sales & Marketing <ul style="list-style-type: none"> <li>• Tracking Prospects &amp; Sales Forecasting</li> <li>• Email/Mass Mail &amp; Templates</li> <li>• Favorites</li> </ul>  |
| 1:45 pm—2:00 pm          | Break   |
| 2:00 pm—2:45 pm          | Time Management <ul style="list-style-type: none"> <li>• Setting up your Start Page to YOUR workflow</li> <li>• Improve Productivity with Tasks &amp; Appointments</li> <li>• Using Outlook Connector</li> </ul>                                |
| 2:45 pm—3:30 pm          | Tips to Improve your Applicant & Customer Portals   |
| 3:30 pm—4:00 pm          | Avionté Update & Closing  |